BCM Rls 6.0

Personal Call Manager

Task Based Guide

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Personal Call Manager

Overview

Personal Call Manager is a TAPI based application that provides a computer interface for your telephone.

With Personal Call Manager you can:

- Make calls.
- Redial telephone numbers.
- Return calls.
- Answer calls.
- Put calls on and off hold.
- Transfer calls.
- Conference calls.

Personal Call Manager also has an address book that enables you to store the names, addresses, and telephone numbers of contacts on your computer, where they are easy to find and use.

You must still use your telephone to speak with the caller. Because of this it is recommend that you use a telephone equipped with hands free.

Required Information

Before commencing Personal Call Manager installation, it would be useful to obtain the following information/facilities:

- The LAN CTE Keycode.
- The DN (Extension) to be used with Personal Call Manager.
- What dialling properties to be configured (External Access Codes/ Routing Codes).

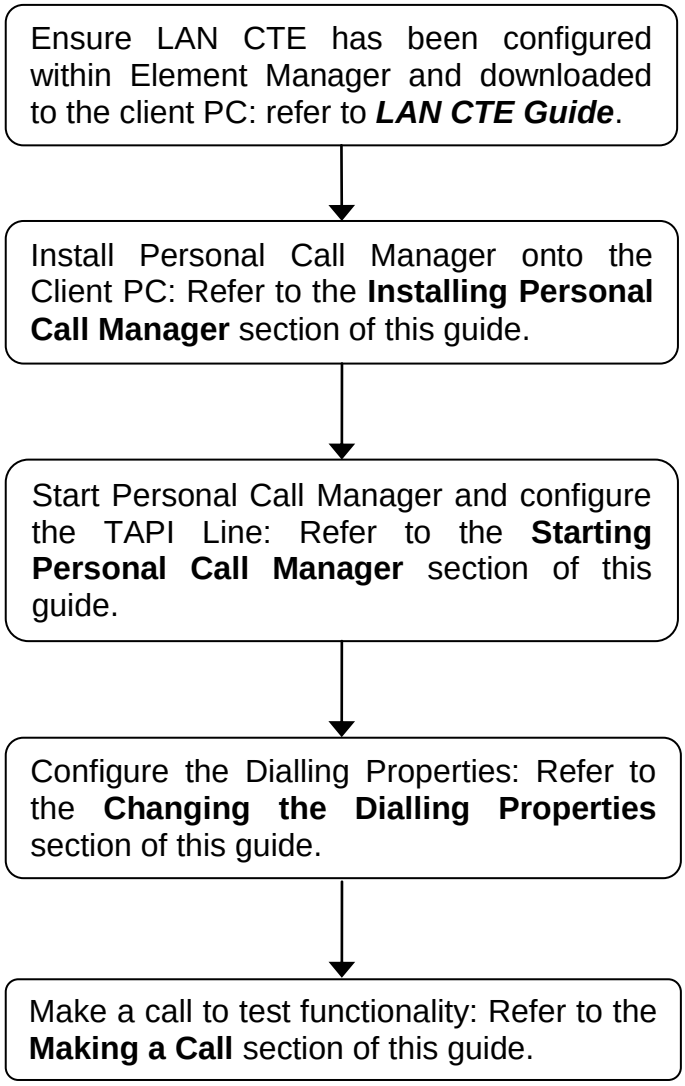
Supported Operating Systems

Personal Call Manager is supported on the following Operating Systems:

- Windows XP Professional SP3
- Windows Vista Business, Ultimate, Enterprise SP2 32 bit
- Windows 7 Professional, Ultimate, Enterprise 32 bit
- Windows Server 2008 Standard and Enterprise SP2

Flowchart

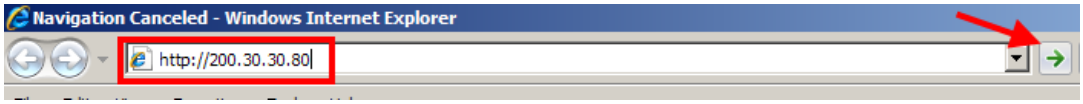
This flowchart depicts the relevant steps required to install and configure the Personal Call Manager application on a desk top PC.


Ensure LAN CTE has been configured within Element Manager and downloaded to the client PC: refer to ***LAN CTE Guide***.
Install Personal Call Manager onto the Client PC: Refer to the **Installing Personal Call Manager** section of this guide.
Start Personal Call Manager and configure the TAPI Line: Refer to the **Starting Personal Call Manager** section of this guide.
Configure the Dialling Properties: Refer to the **Changing the Dialling Properties** section of this guide.
Make a call to test functionality: Refer to the **Making a Call** section of this guide.

Installing Personal Call Manager

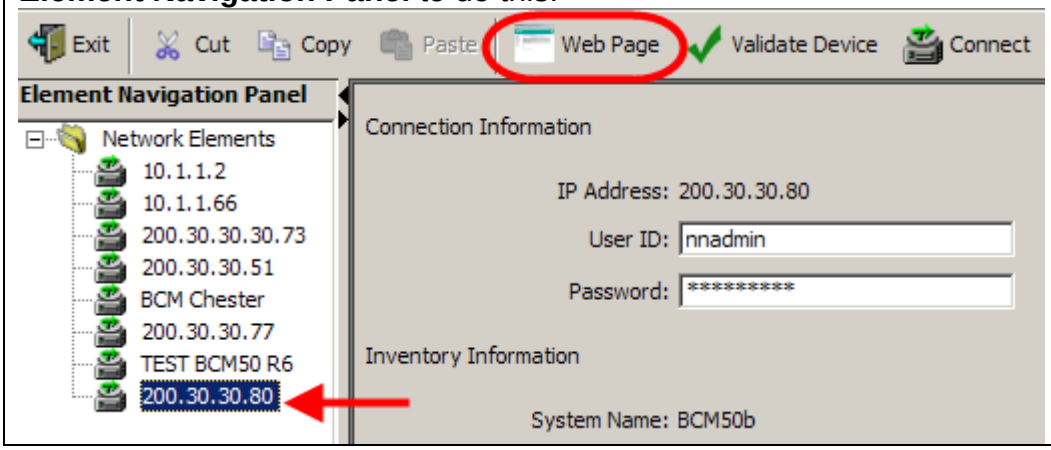
1. Exit any Windows applications that are running.

2. Open Internet Explorer.In the address field type (replacing the relevant part with your BCM IP address): **http://<bcm ip address>/**

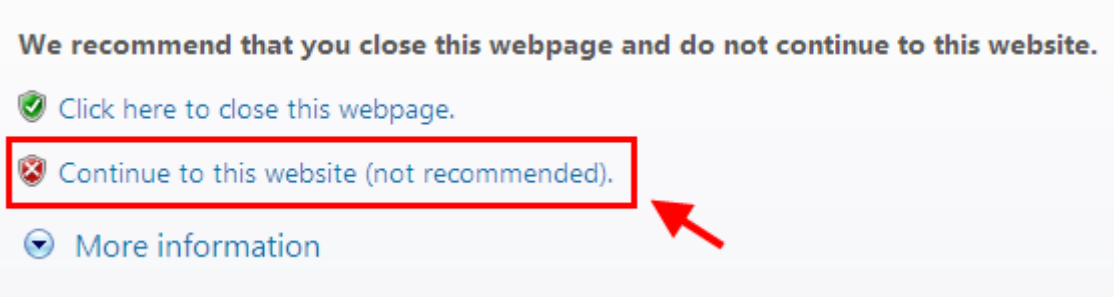


3. Click on **Go**, or press **Return** on your keyboard.

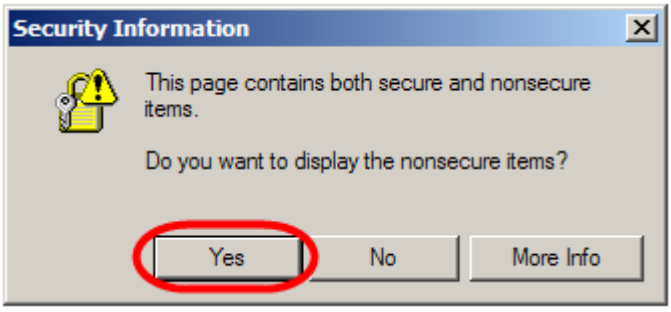
Note: You can also use the **Web Page** button in Element Manager to launch a web broswer session. The BCM you wish to access must be selected in the **Element Navigation Panel** to do this.



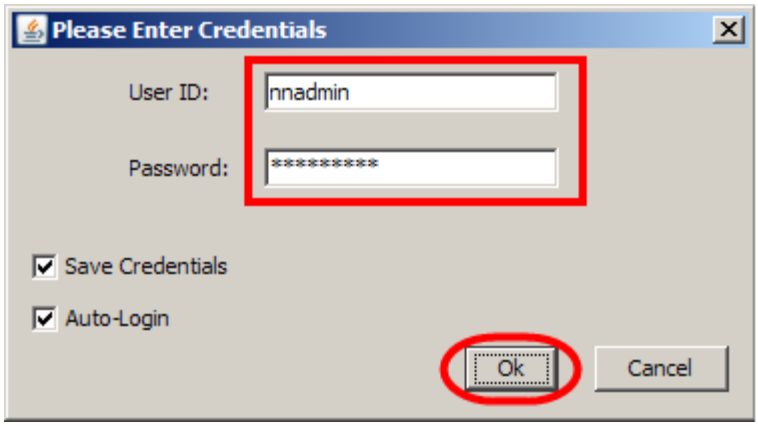
4. If you are presented with the **Certificate Error** window, click on **Continue to this website (not recommended)**.


We recommend that you close this webpage and do not continue to this website.
Click here to close this webpage.
Continue to this website (not recommended).
More information

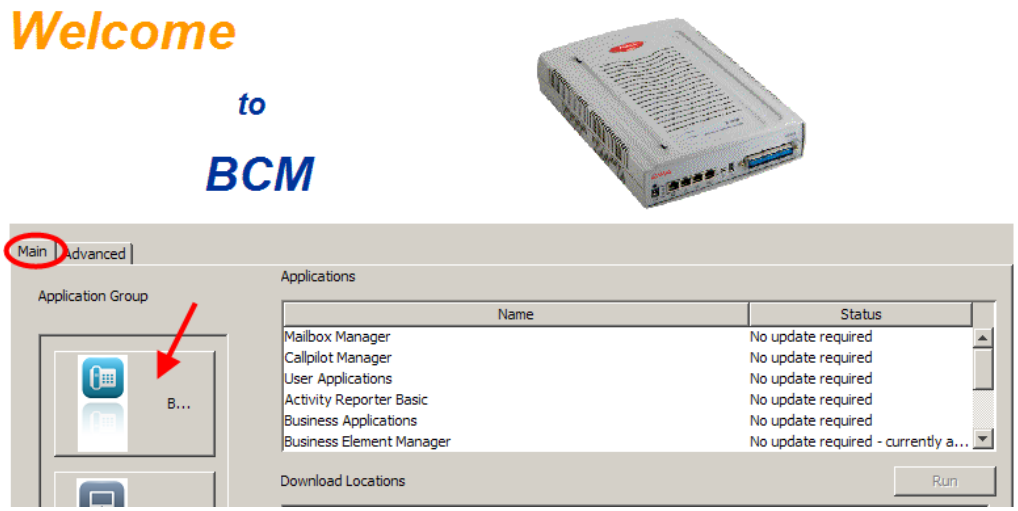
5. Accept any further security messages that you may get presented with.



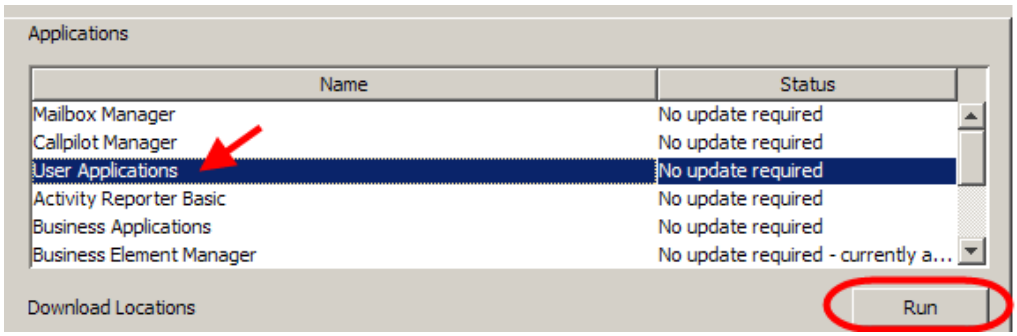
6. You will now see the login screen, enter your BCM User name and Password. By default these are set to User ID*:* **nnadmin** Password*:* **PlsChgMe!** Click on **OK.**



7. In the **Welcome to BCM** window, ensure the **Main** tab has been selected, and the **BCM** button clicked.



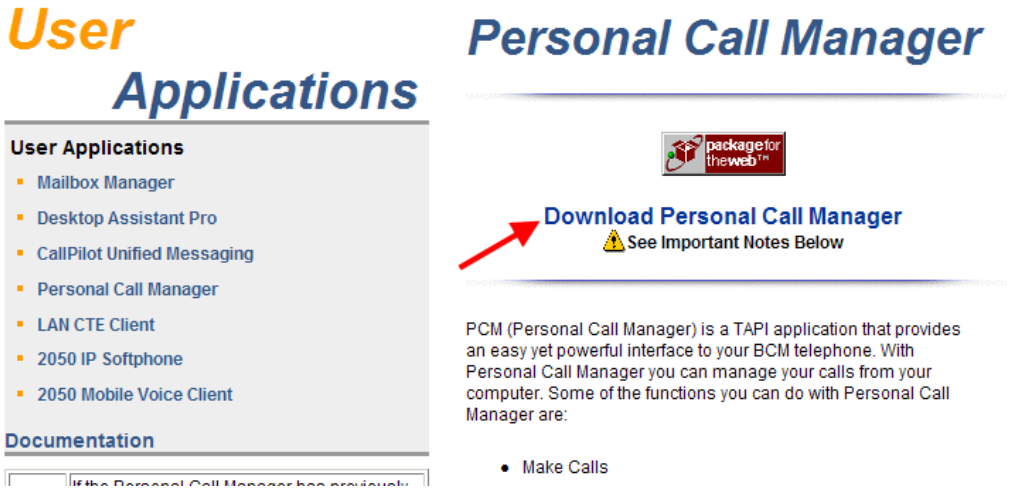
8. In the **Applications** area, select **User Applications**,and click on **Run**.



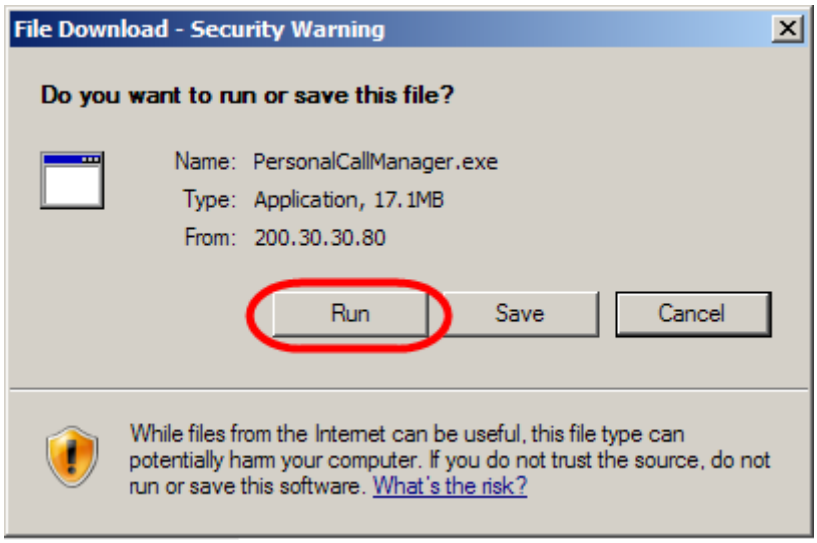
9. Again, accept any security messages that appear, and if prompted enter any login details.

10. The **User Applications** screen will be displayed. Click on the **Personal Call Manager** Link.

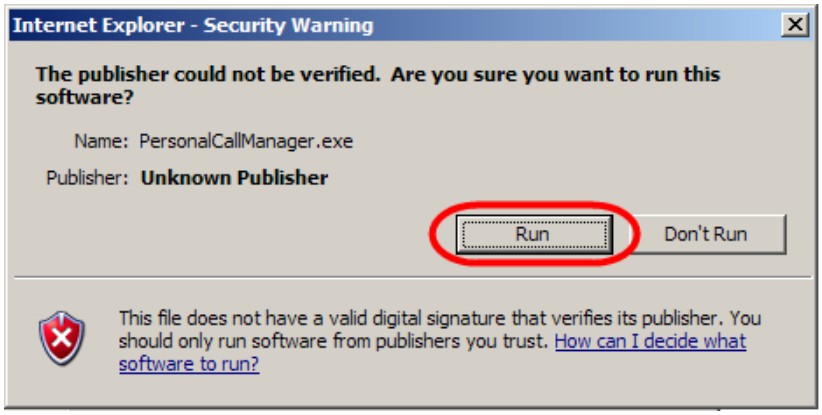
11. Click the **Download Personal Call Manager** link.


User
Applications
User Applications
Mailbox Manager
Desktop Assistant Pro
CallPilot Unified Messaging
Personal Call Manager
LAN CTE Client
2050 IP Softphone
2050 Mobile Voice Client
Documentation
Personal Call Manager
Download Personal Call Manager
See Important Notes Below
PCM (Personal Call Manager) is a TAPI application that provides an easy yet powerful interface to your BCM telephone. With Personal Call Manager you can manage your calls from your computer. Some of the functions you can do with Personal Call Manager are:
Make Calls

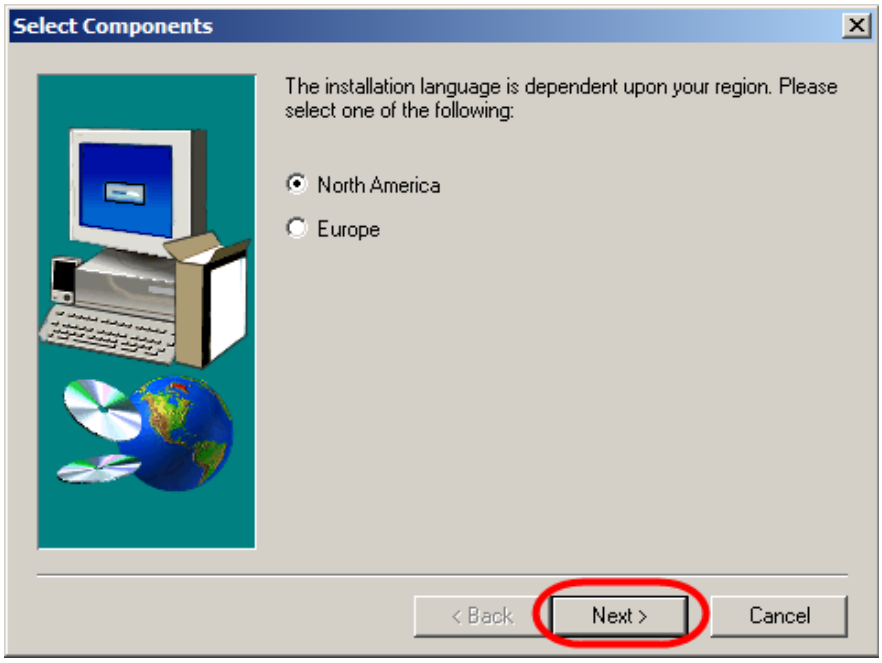
12. The File Download screen will appear. Click the **Run** button**.**


File Download - Security Warning
Do you want to run or save this file?
Name: PersonalCallManager.exe
Type: Application, 17.1MB
From: 200.30.30.80
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

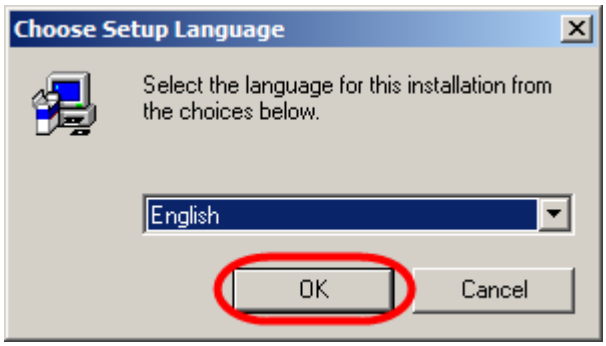
13. Personal Call Manger will start to download. The **Security Warning** Screen will appear, click **Run**.


Internet Explorer - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: PersonalCallManager.exe
Publisher: Unknown Publisher
Run
Don't Run
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust. How can I decide what software to run?

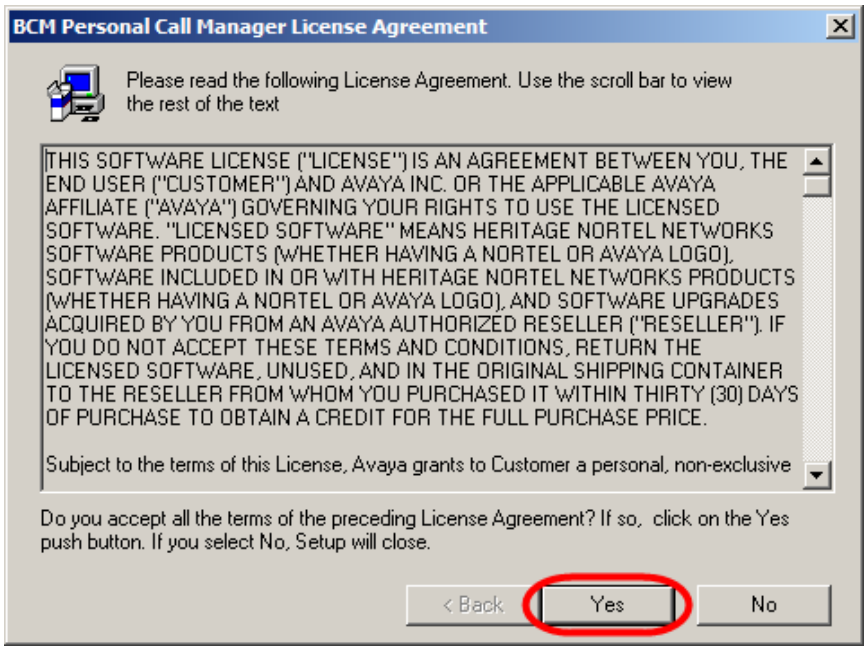
14. The Select Components Screen will appear. Select the most appropriate location, and click **Next**.


Select Components
The installation language is dependent upon your region. Please select one of the following:
North America
Europe
< Back
Next >
Cancel

15. The **Choose Set Up Language** screen will appear. Select the language required and click **OK**.



16. The **Licence Aggreement** screen will appear, select **Yes**.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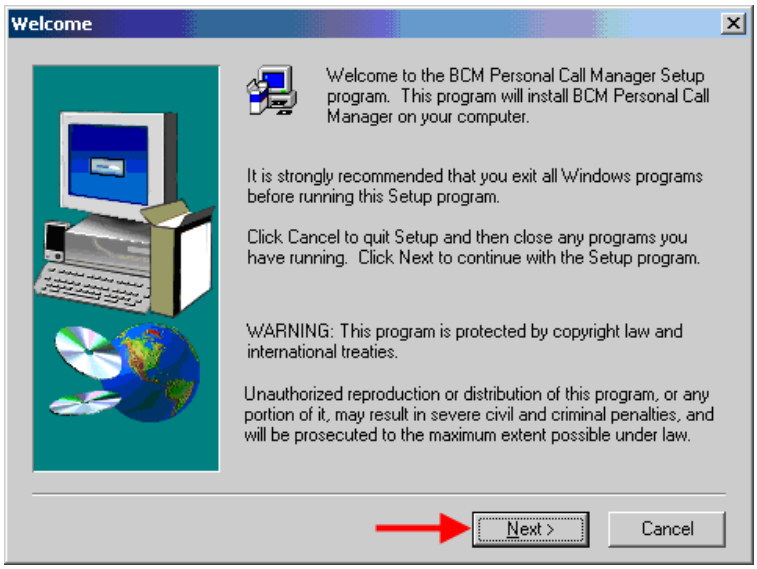
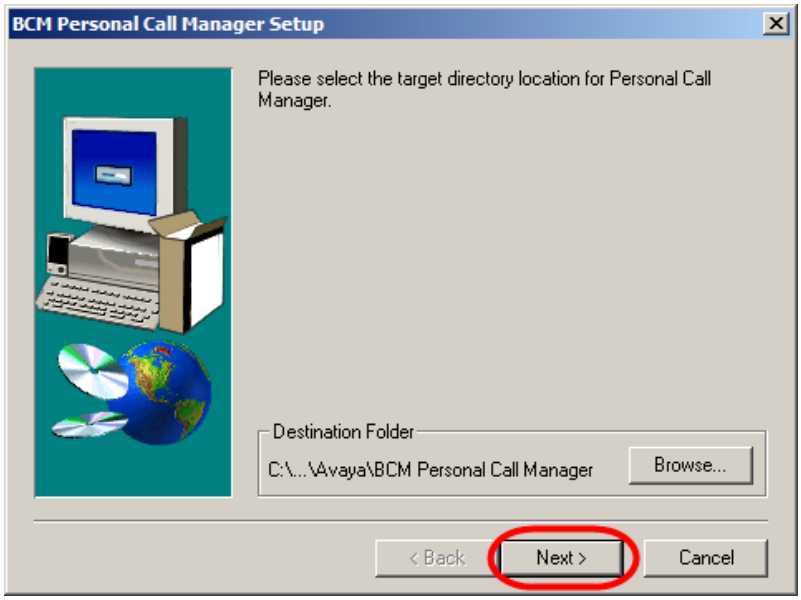
Subject to the terms of this License, Avaya grants to Customer a personal, non-exclusive
Do you accept all the terms of the preceding License Agreement? If so, click on the Yes push button. If you select No, Setup will close.
< Back
Yes
No

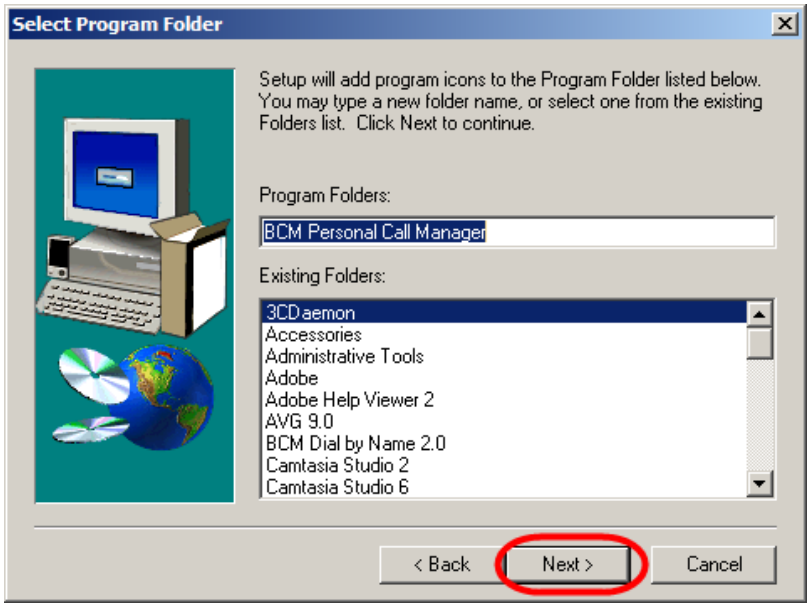
17. The **Welcome** screen will appear, click **Next**.


Welcome
Welcome to the BCM Personal Call Manager Setup program. This program will install BCM Personal Call Manager on your computer.
It is strongly recommended that you exit all Windows programs before running this Setup program.
Click Cancel to quit Setup and then close any programs you have running. Click Next to continue with the Setup program.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

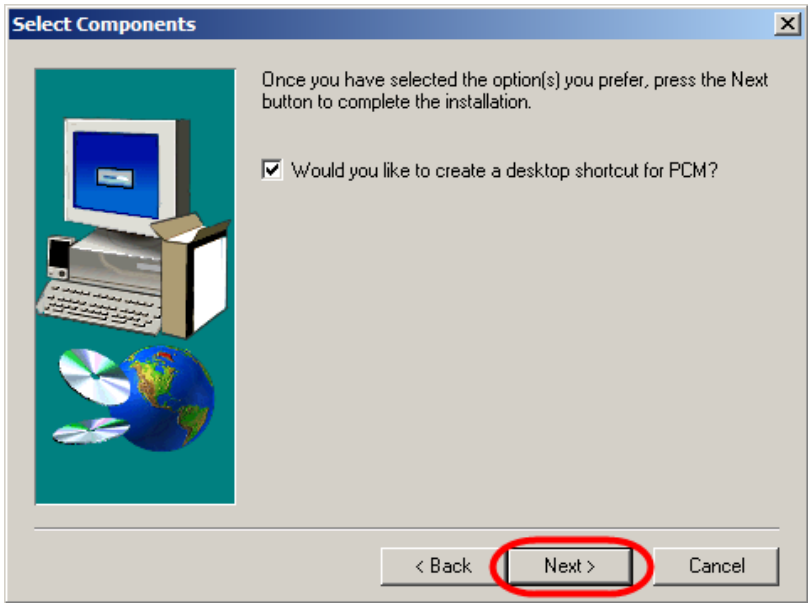
18. The **Destination Folder Screen** will appear. Click **Next** to accept the default location.



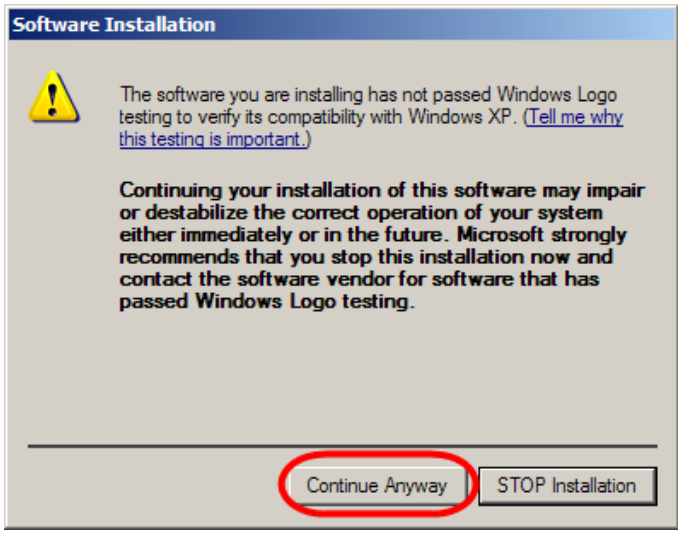
19. The **Select Program Folder** screen will appear, click **Next**.


Select Program Folder
Setup will add program icons to the Program Folder listed below. You may type a new folder name, or select one from the existing Folders list. Click Next to continue.
Program Folders:
BCM Personal Call Manager
Existing Folders:
3CDaemon
Accessories
Administrative Tools
Adobe
Adobe Help Viewer 2
AVG 9.0
BCM Dial by Name 2.0
Camtasia Studio 2
Camtasia Studio 6
< Back
Next >
Cancel

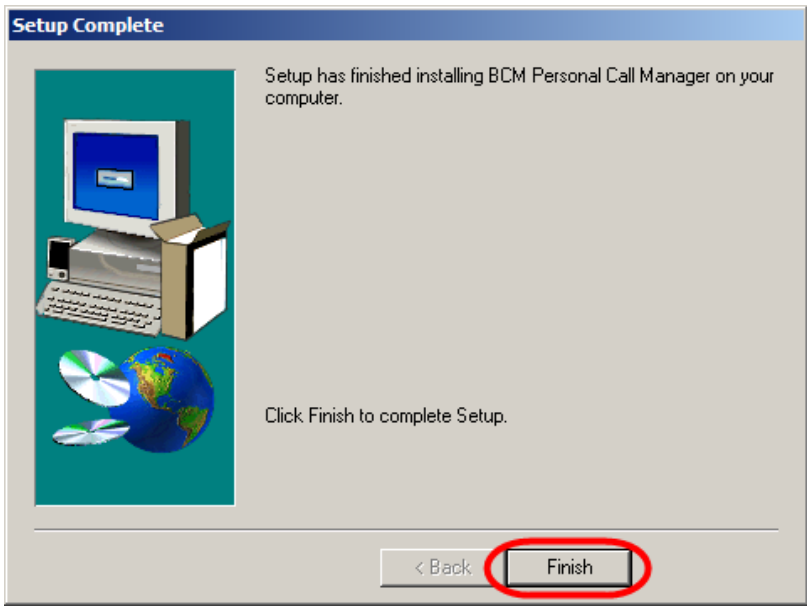
20. If you wish to create a shortcut to Personal Call Manager on your desktop, leave a tick in the check box and click **Next**.


Select Components
Once you have selected the option(s) you prefer, press the Next button to complete the installation.
Would you like to create a desktop shortcut for PCM?
< Back
Next >
Cancel

21. Click **Continue Anyway** in the **Software Installation** window.

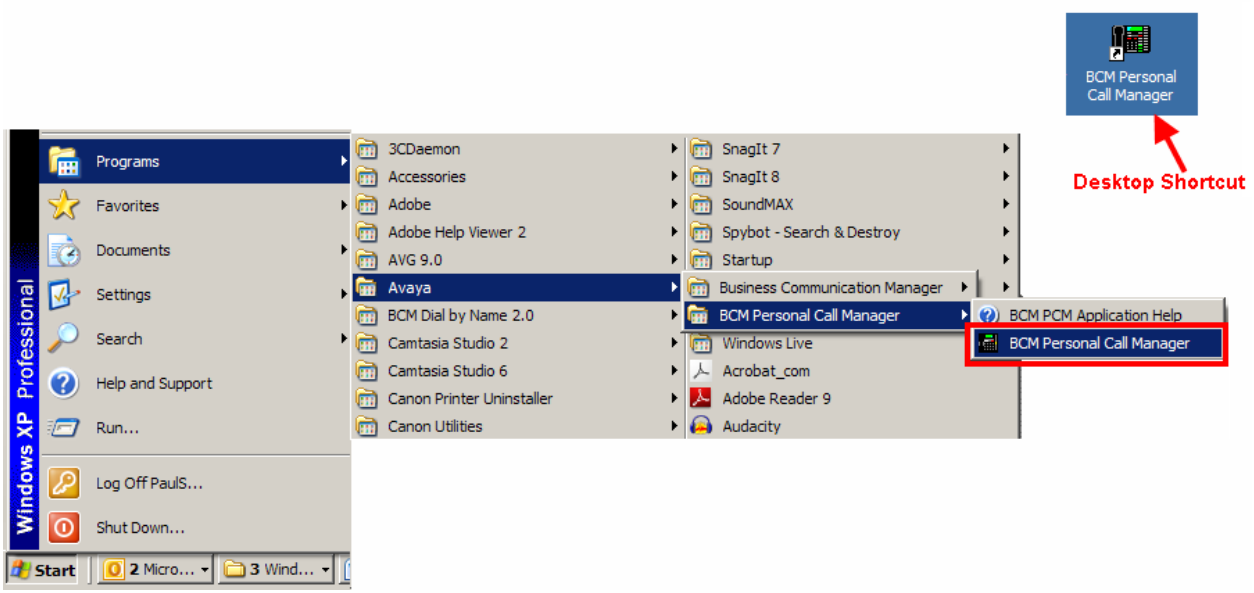

Software Installation
The software you are installing has not passed Windows Logo testing to verify its compatibility with Windows XP. (Tell me why this testing is important.)
Continuing your installation of this software may impair or destabilize the correct operation of your system either immediately or in the future. Microsoft strongly recommends that you stop this installation now and contact the software vendor for software that has passed Windows Logo testing.
Continue Anyway
STOP Installation

22. The **Setup Complete** window will be displayed, Click **Finish**.


Setup Complete
Setup has finished installing BCM Personal Call Manager on your computer.
Click Finish to complete Setup.
< Back
Finish

Starting Personal Call Manager

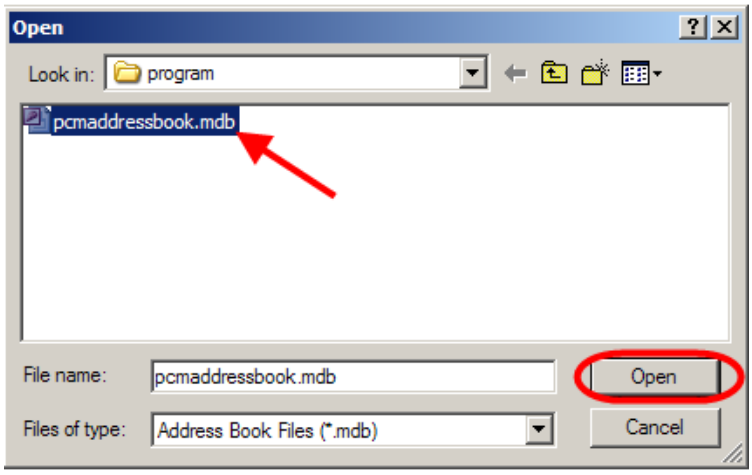
Personal Call Manager can be found from the Start menu or the shortcut on your desktop.



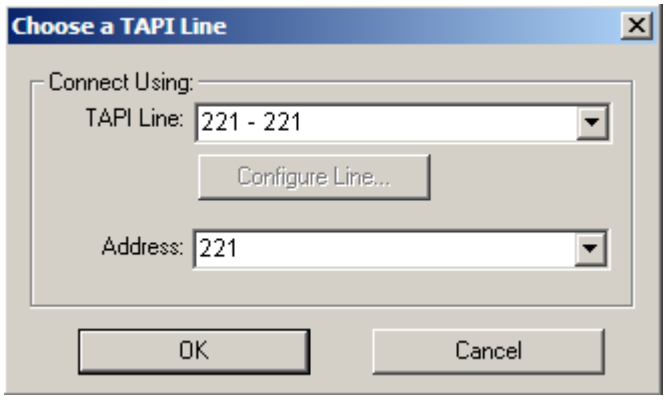
When you start Personal Call Manager you will need to set up the TAPI line (DN) that the client is using.

1. Start Personal Call Manager.

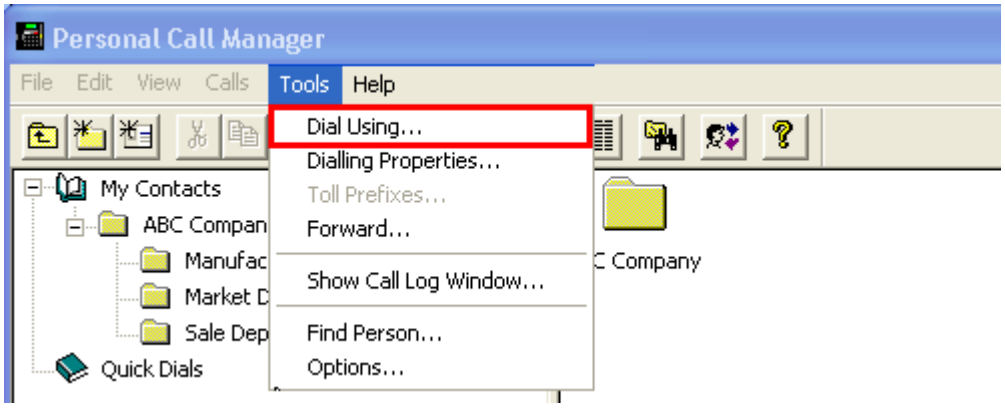
2. You may be asked to specify a contact database (.mdb format) which stores your own contact information. If this is the first time you have used Personal Call Manager, select the default database and click **Open**.



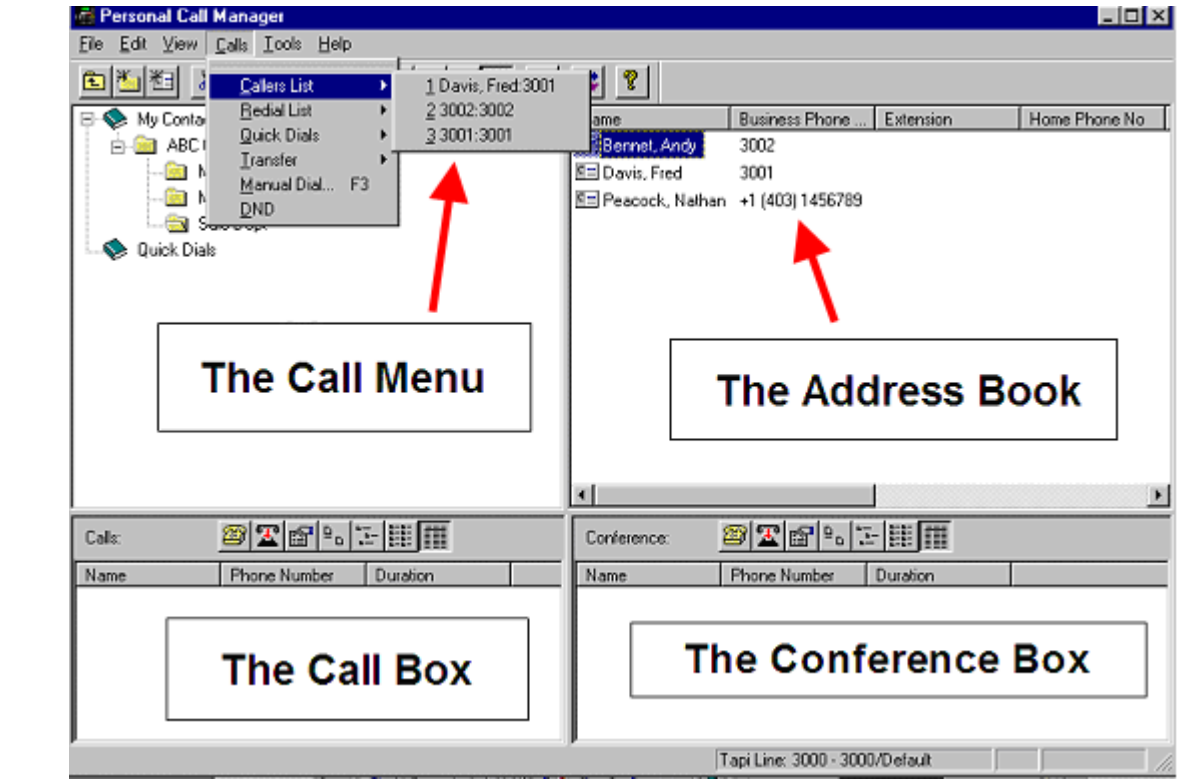
3. You will be presented with the **Choose TAPI Line** box. Select your extension's DN as the **TAPI line**. Then in the **Address** field select your extensions DN number.

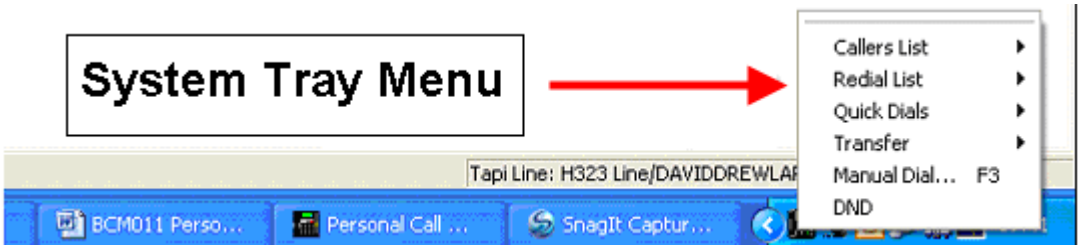


4. The TAPI line can also be selected by selecting **Tools** and **Dial Using**.



5. You will then be presented with Personal Call Manager screen.



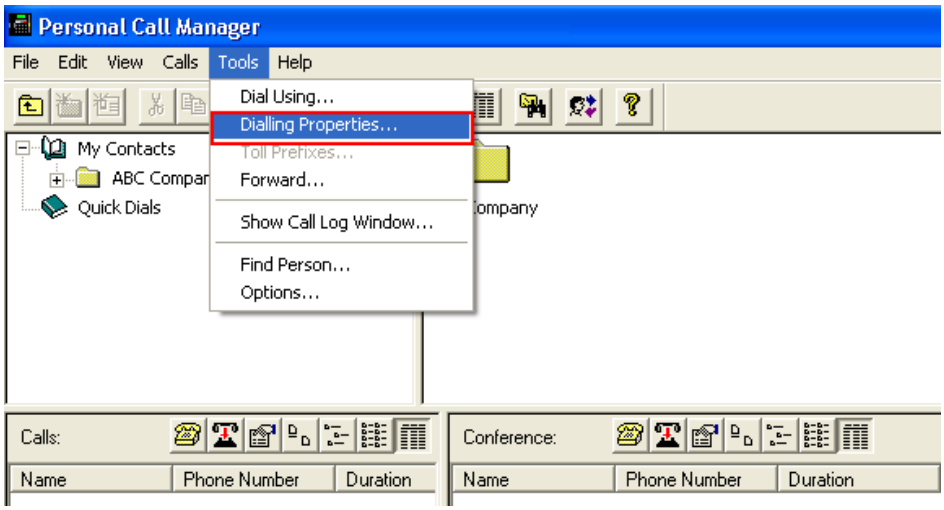


Changing the Dialing Properties

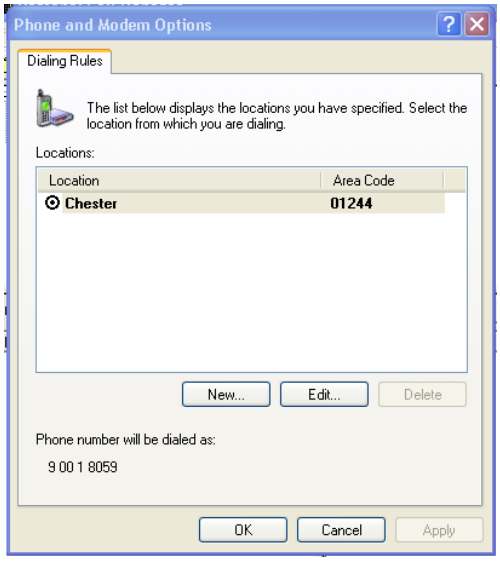
You use the Dialing Properties to define where you are situated and what is required to dial from this location.

To access Dialing Properties:

1. Click the **Tools** menu and then click **Dialing Properties**.

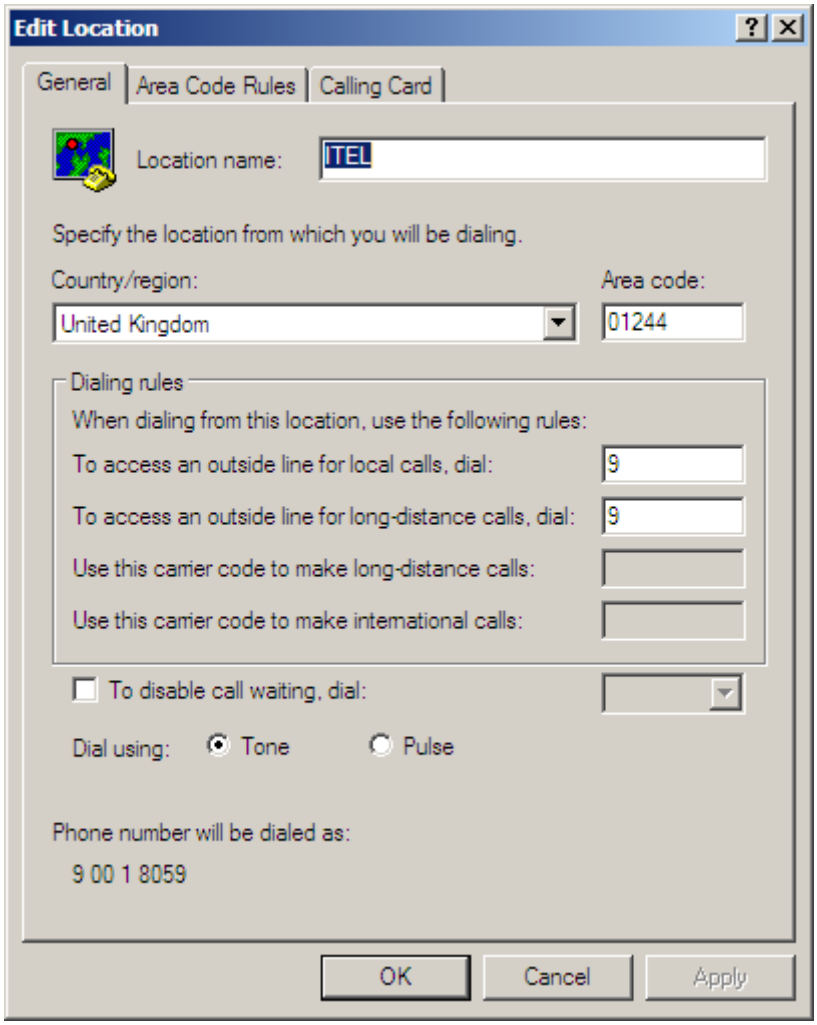


2. The Dialing Properties dialogue box appears.



3. From the Dialing Properties dialogue box you can control these options:
   - The location you are dialing from (I am dialing from).
   - The country you are in (I am in this country).
   - The area code you are dialing from (Area Code).

4. By selecting the Edit Button you can edit your dialling preferences.



Attribute	Description
Location Name	Provides a space to type a name for the dialling location
Country/ Region	Allows you to indicate the Country or Region of the dialling location
Area Code	The area code for this location
Line Access Digit	The number required to access an outside line for local calls
Long Distance Line Access Digit	The number required to access an outside line for International calls

5. There are two boxes for accessing outside lines. The first box is for the digits required to access local numbers and the second box is for the digits required to access long distance lines. These access numbers are required if you are using a line pool or call routing to make calls. These numbers are the same numbers you dial if you are making an outside call from your telephone.

Note: If you do not dial an extra number (e.g. 9) when making a call from your telephone, leave these boxes blank.

Making a Call

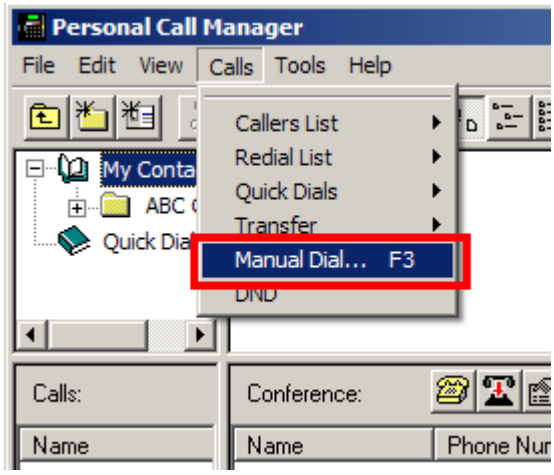
Using Personal Call Manager, you can make a call using the Calls menu, the Personal Call Manager task tray menu, the toolbar, or the Address Book. When you make a call, the Ringing icon appears in the Calls box, the Personal Call Manager task tray menu and the Calls menu. When the call is answered, the icon changes to the Active Call icon. Both the Ringing and the Active icons have a label that is used to identify the call.

If you make a call using the Address Book, the name in the Address Book is used as the label for the call.

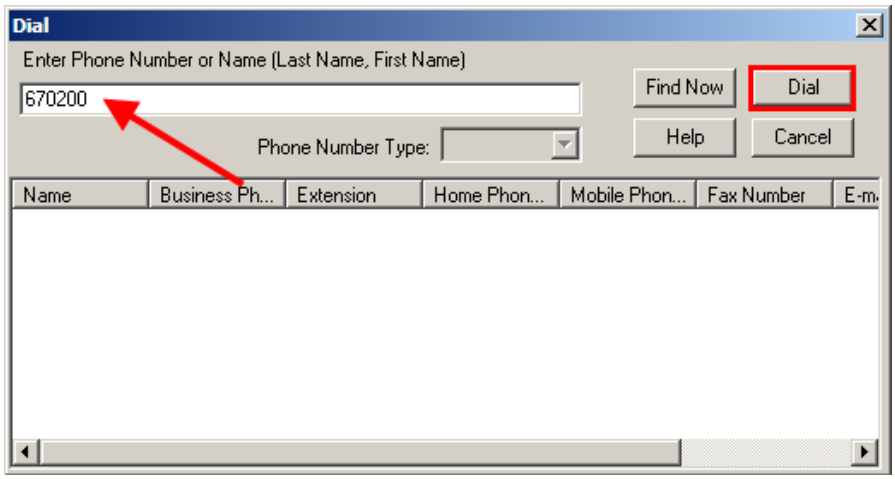
Making a Call Using the Calls Menu

To make a call:

1. Click the **Calls menu** and then click **Manual Dial**.



2. The Dial dialogue box appears.

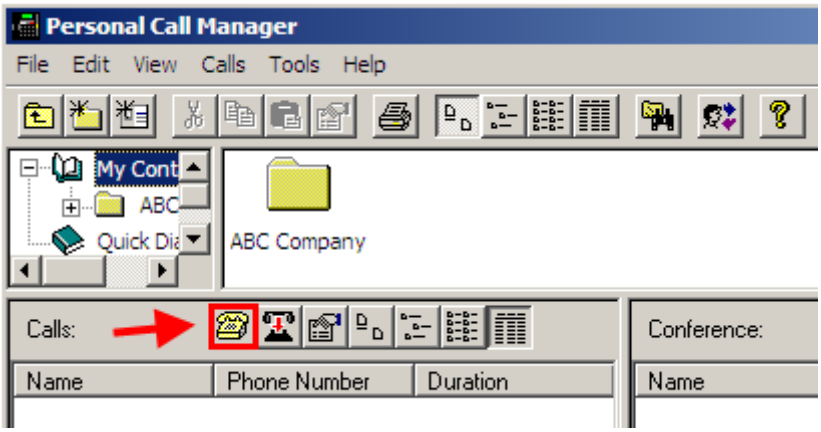


3. Type the telephone number you want to dial and click the **Dial** button.

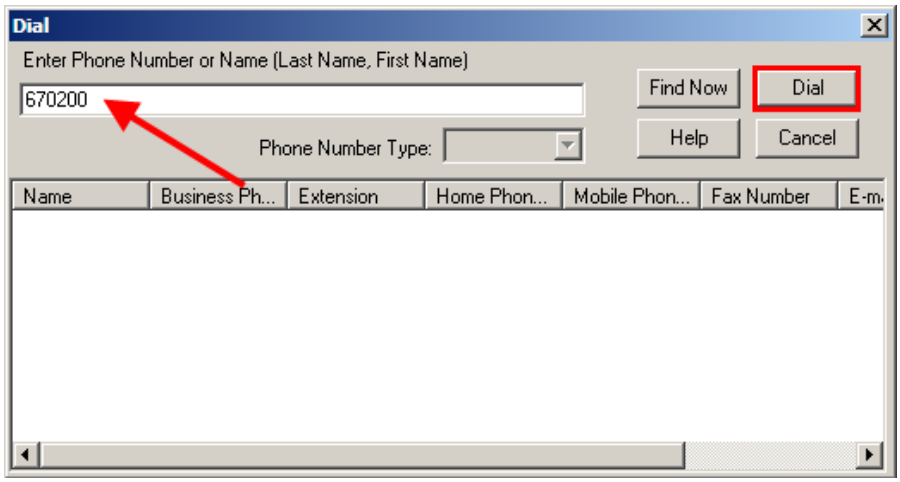
Making a Call Using the Toolbar

To make a call using the toolbar:

1. Click the **Phone Icon** on the **Tool** bar.



2. The Dial dialogue box appears.



3. Enter the telephone number you want to dial, and cick the **Dial** button.

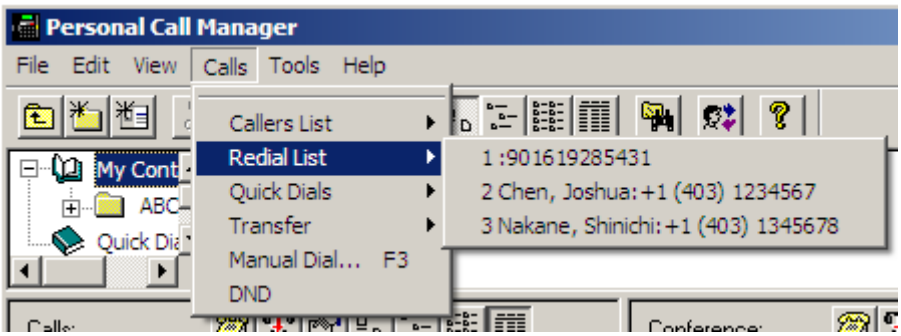
Redialling a Number

Personal Call Manager keeps a list of the last ten telephone numbers you called. The most recent call is at the top of the list and the oldest call is at the bottom. When there are ten calls on the list and you make another call, the new call is added to the top of the list and the oldest call is deleted.

If you call a number that is on the list, the number does not appear on the list a second time. The number is moved from its previous location to the top of the list.

To redial one of the last ten telephone numbers:

1. Click the **Calls menu** and then point to **Redial List**.



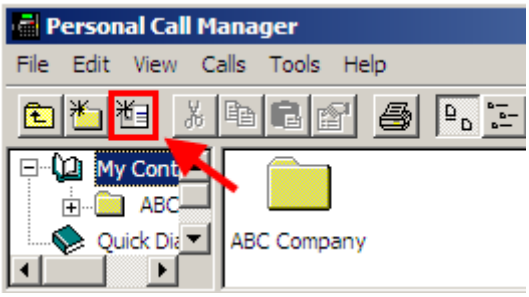
2. Click the number you want to redial.

Contacts

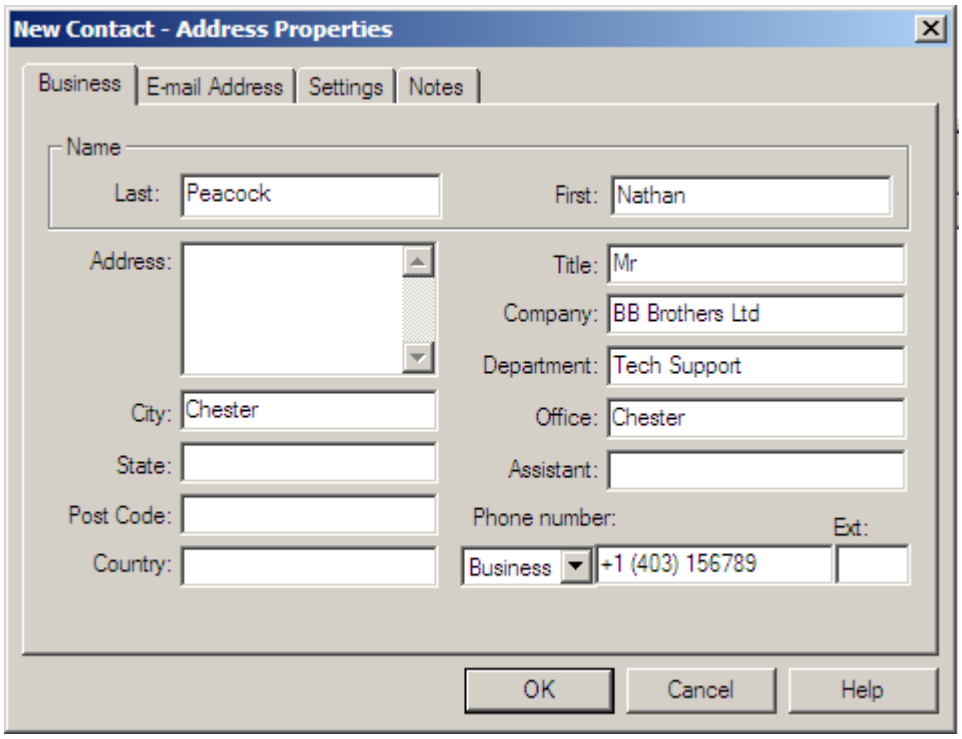
A contact is any entry in the Address Book. A contact can be a person, business, or any number or address you want stored in Personal Call Manager. Contacts are added using the Address Properties dialogue box.

To add a contact using the toolbar:

1. Click the **New Contacts icon** on the Tool Bar.



2. The **Address Properties** dialogue box appears.



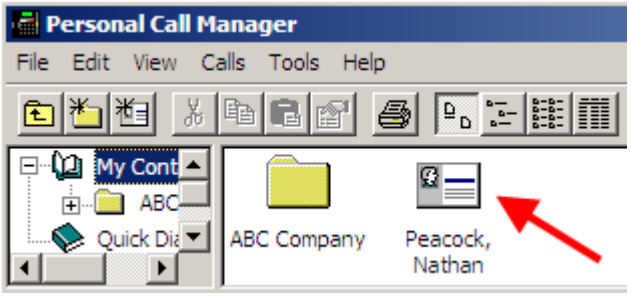
Note: The minimum contact details required are: First name, last name and a phone number.

3. Enter the address information for this contact.

4. Click the **OK** button.

5. The Contact will be added to the **My Contacts** Folder.

6. To dial a Contact, double click on the contact you wish to call. The Contact will then be called.



Returning a Call

Personal Call Manager keeps a list of the telephone numbers of the last ten people who called you.

The Callers List shows both the calls you answered and the calls you were unable to answer. You can use this list to return the calls.

The calls on the Callers List are numbered from one to ten. Call number one is the most recent call and is stored at the top of the list. Call number ten is the oldest call and is stored at the bottom of the list. When there are ten calls on the list and you receive another call, the new call is added to the top of the list and the oldest call is deleted. If you receive a call from a number that is on the list, the number does not appear on the list twice. The number is moved from its previous location to the top of the list.

Telephone numbers appear on the Callers List if:

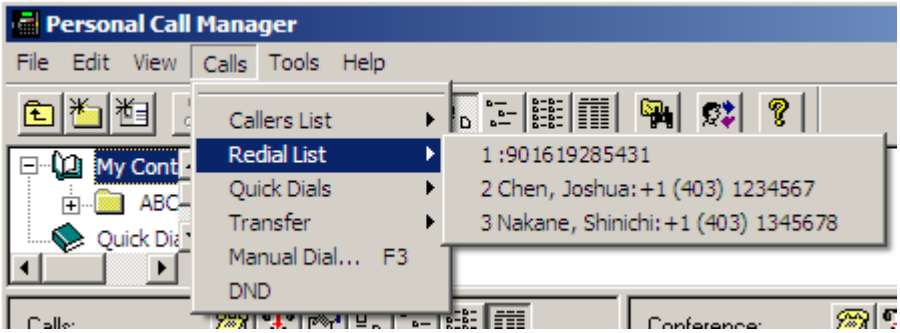
- You subscribe to a Caller ID (CLID) service.

Or

- You receive an internal call through Business Communications Manager.

To return a call:

1. Click the **Calls menu** and then open the **Callers List**.



2. Click the number of the person you want to call.

Answering a Call

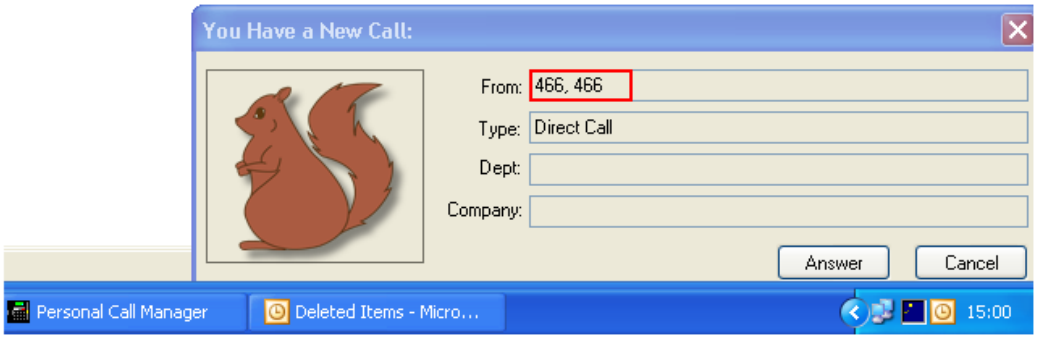
Personal Call Manager notifies you when there is an incoming call. When someone calls you, the **You Have a New Call** dialogue box appears, and the Ringing icon appears in the Calls box, the Personal Call Manager task tray menu and the Calls menu. If you subscribe to a Caller ID service, or you are receiving an internal call through Business Communications Manager, the name or number of the caller appears below the icon and in the You Have a New Call dialogue box.

When a call is made or received, an icon appears in the Calls box, Calls menu, and Personal Call Manager task tray menu. These icons are given a label to help identify who is on the call. The information on the label depends on several factors. If you subscribe to a Caller ID service, Personal Call Manager compares the received number to the numbers stored in the Address Book. If a match is found, the name from the Address Book appears with the Active Call icon. If a match is not found, the name sent with the Caller ID information appears. If a match is not found and a name is not sent with the Caller ID information, the telephone number appears. If no Caller ID information is available, or you do not subscribe to this service, the word Unknown is used as the label.

Internal calls show the name of the contact stored in the Address Book if available. When there is no name for the caller in the Address Book, the Business Communications Manager Extension name appears.

Answering a Call Using the 'You Have a New Call' Dialogue Box

1. Personal Call Manager displays the **You Have a New Call** dialogue box when you receive a call.

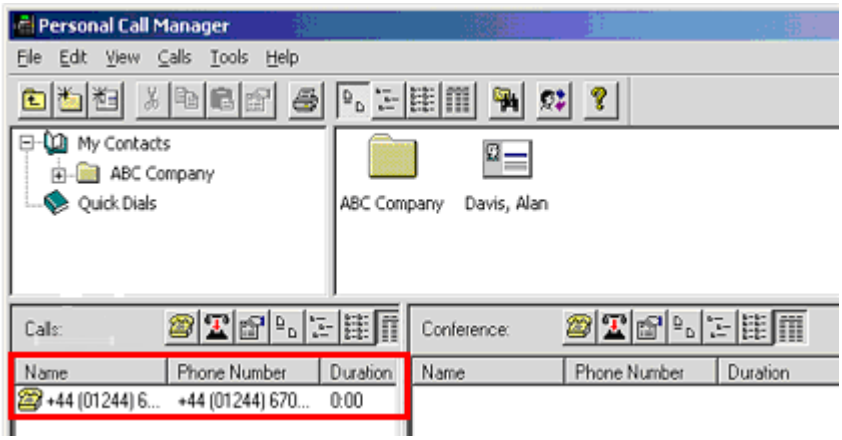


2. To answer the call, click the **Answer** Button.

Answering a Call from the Window

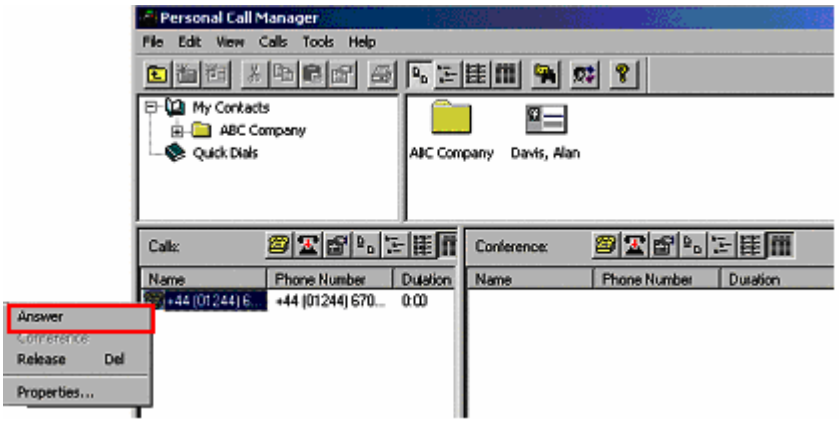
To answer the call:

1. Double-click the **Ringing** icon.

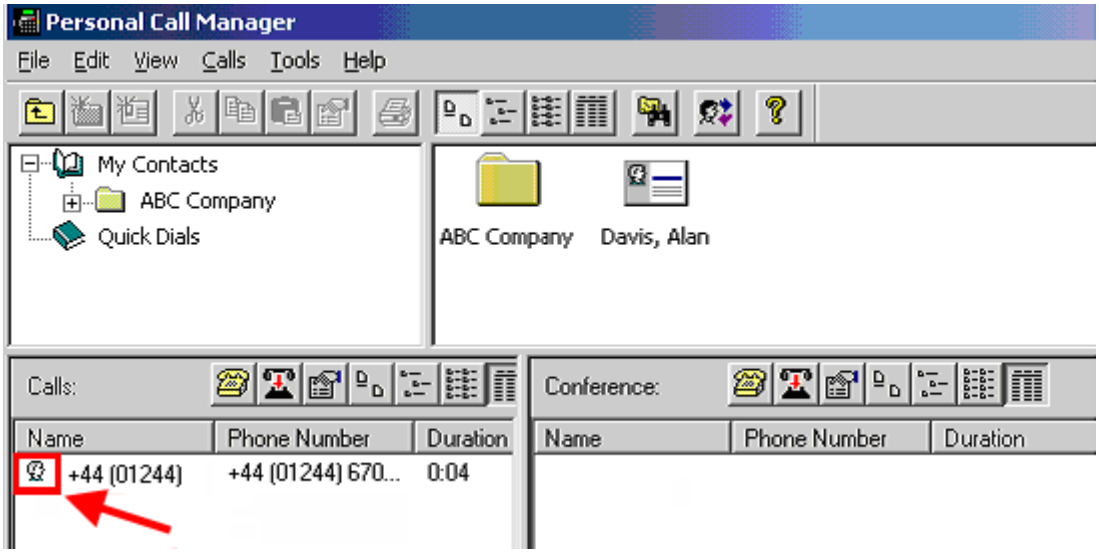


Or

2. Right-click the Ringing icon in the Calls box and then click **Answer**.



3. When you answer the call the icon will change to the **Active Call** icon.



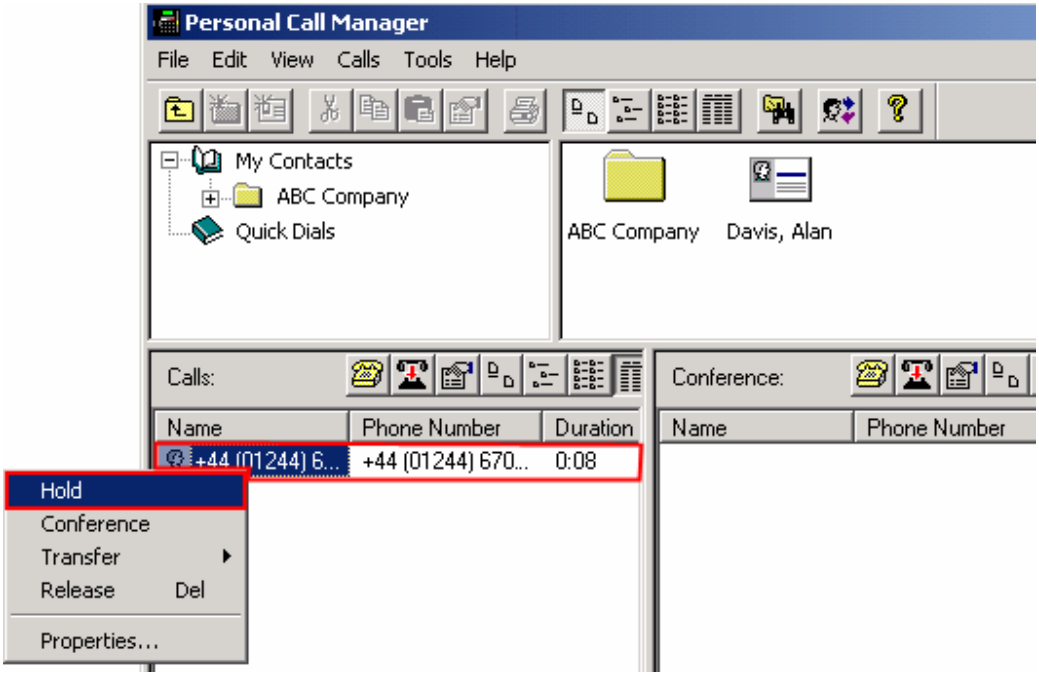
Putting a Call on Hold

When a call is put on hold, the icon for the call changes from the Active Call icon to the Held Call icon.

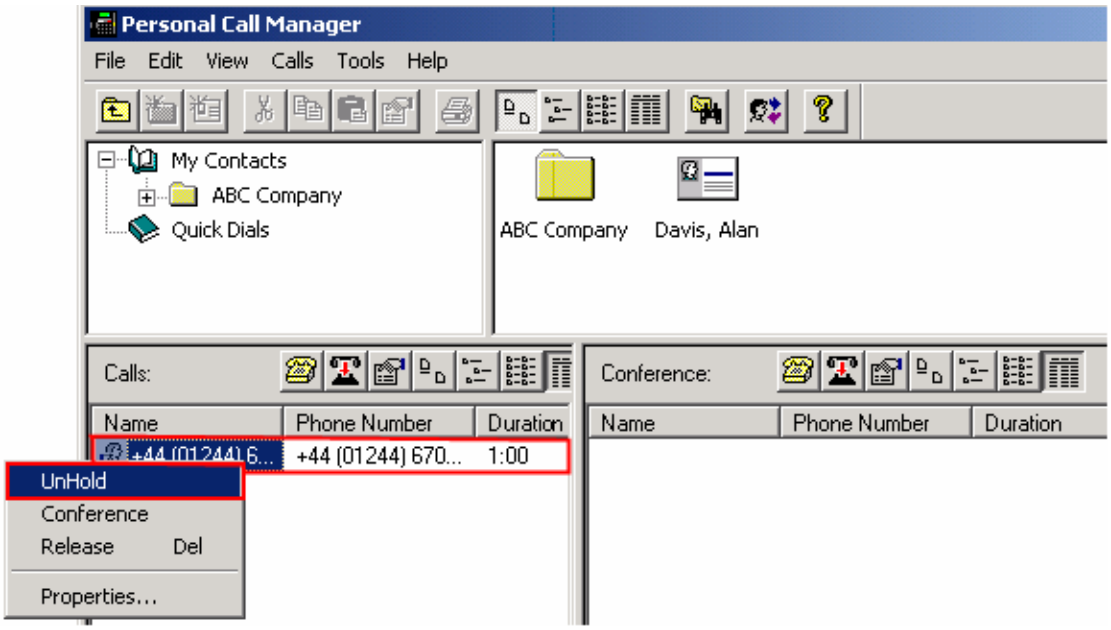
To put a call on hold:

1. Make or answer the call.

2. Right-click the icon of the call in the **Calls box** and then click **Hold**.



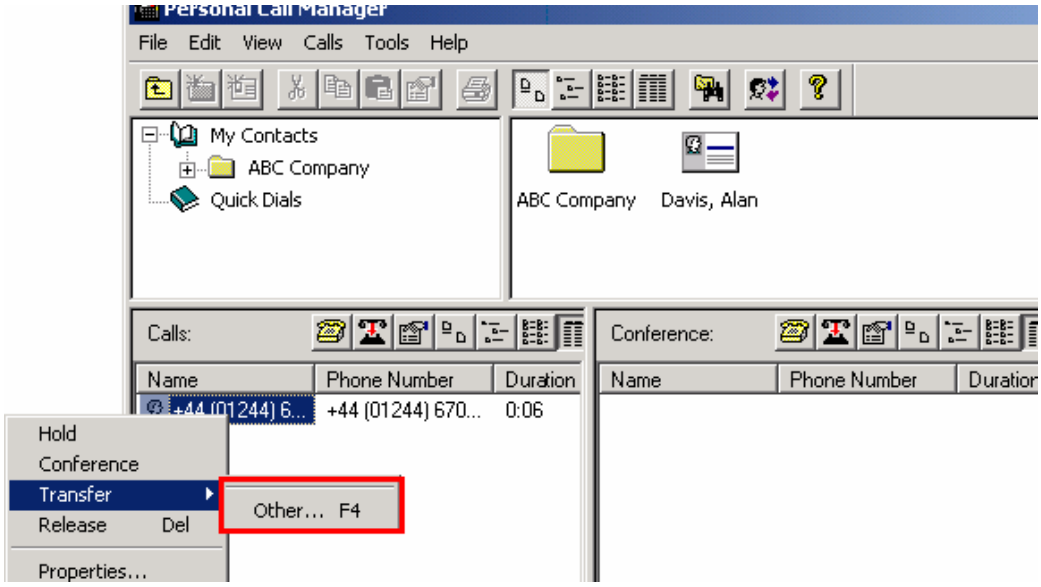
3. To answer a held call, right-click the icon of the call in the **Calls box** and then click **UnHold**.



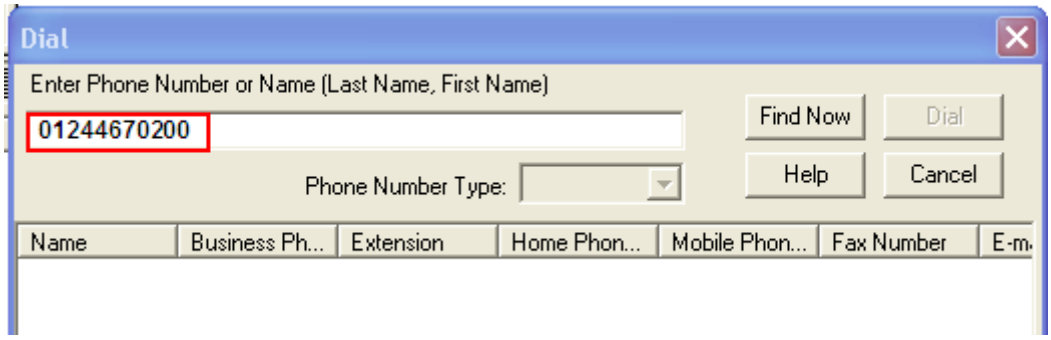
Transferring a Call

To transfer a call:

1. Make or answer the call.
2. Right-click the icon in the **Calls box** and then point to **Transfer**.
3. If the person you want to transfer the call to does not appear on the list of current calls, click **Other**.



4. The Transfer dialogue box appears.
5. Type the telephone number of the person you want to transfer the call to.



6. Click the **Transfer** button.
7. The call is transferred to the number entered.

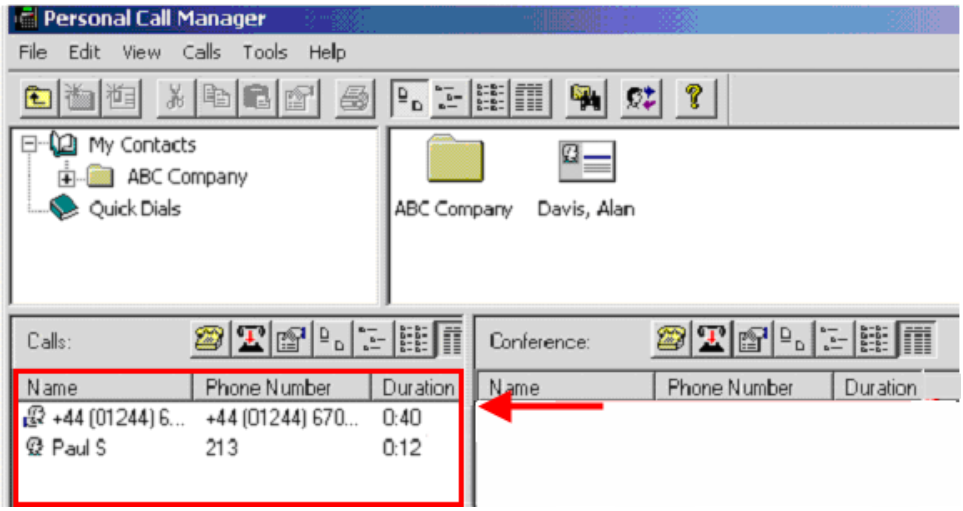
Conferencing a Call

In a conference call you connect yourself and two other people onto a single call.

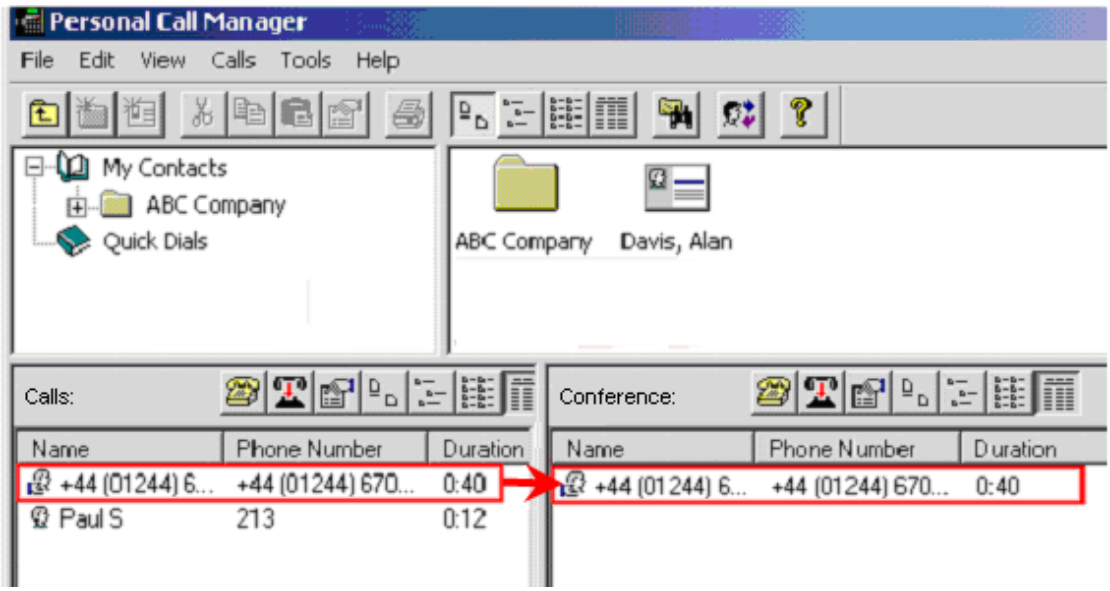
To create a conference you must have the resources configured on your phone. Two Intercom keys will work for most situations.

To create a conference:

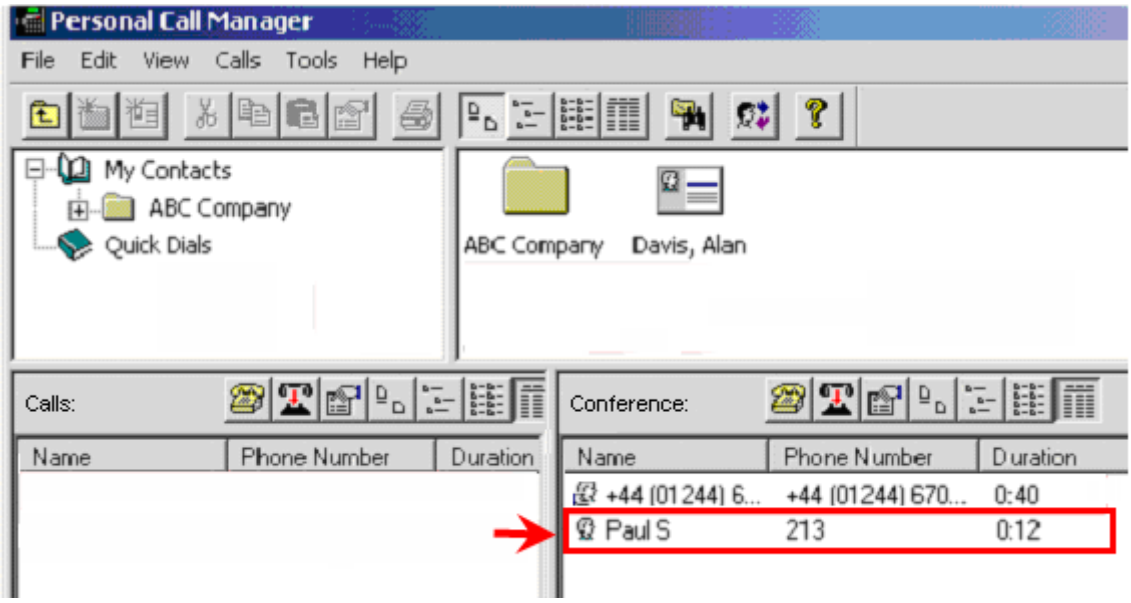
1. Make or answer the two calls you want to connect in a conference call.



2. Drag the icon of the **first** call from the Calls box to the **Conference box**.



3. Drag the icon of the **second** call from the Calls box to the **Conference box**.



4. The two calls are now conferenced.

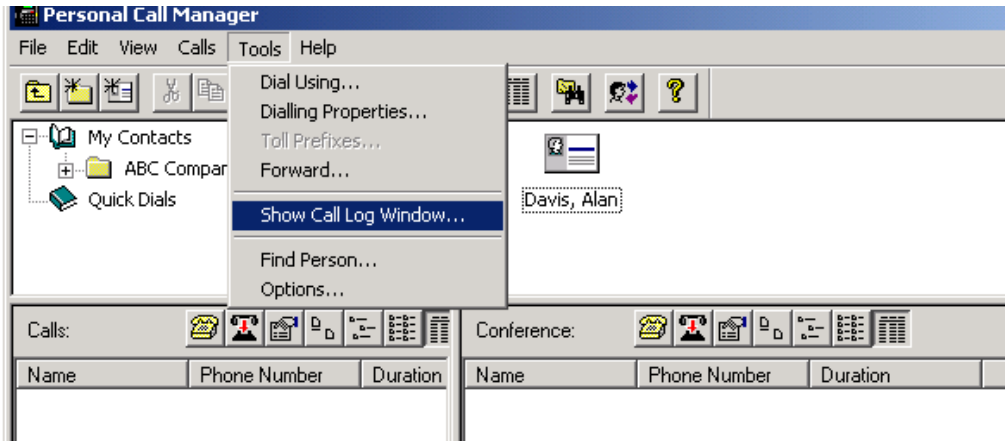
Viewing the Calls Log

The Calls Log consists of two parts: the Incoming Calls Log and the Outgoing Calls Log. The Incoming Calls Log shows all of the calls that were made to your telephone.

The Outgoing Calls Log shows all of the calls you made from your telephone. Calls made or received while Personal Call Manager was not operating do not appear.

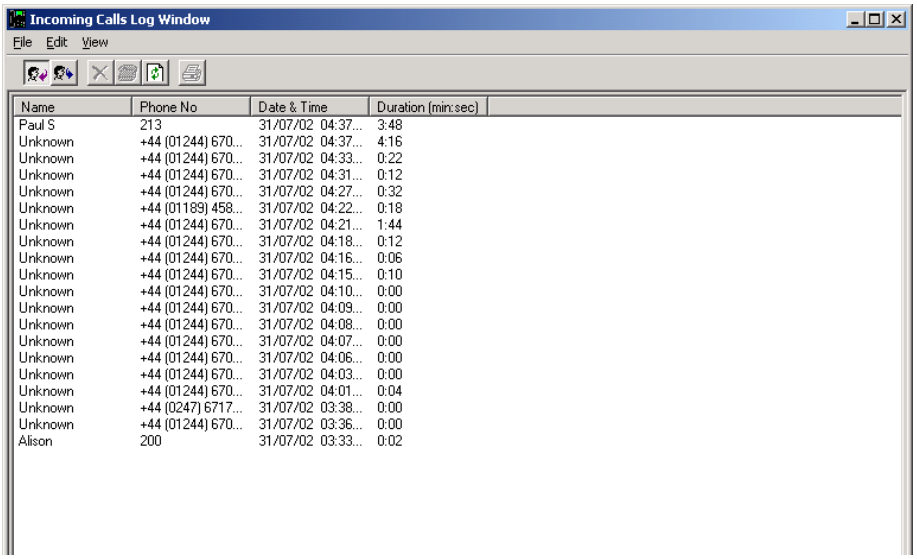
To view the Calls Log:

1. Click the **Tools** menu and then click **Show Call Log Window**.



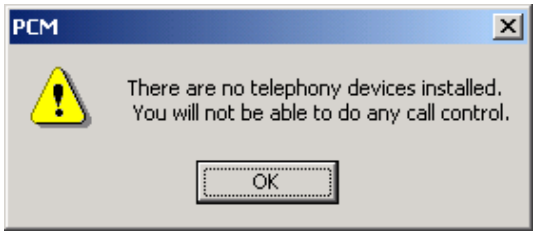
2. The Calls Log window appears with either the Incoming Calls showing or the Outgoing Calls showing.

3. To make a call from the Calls Log window, **double**-click on the name or number of the caller with your **left** mouse button.

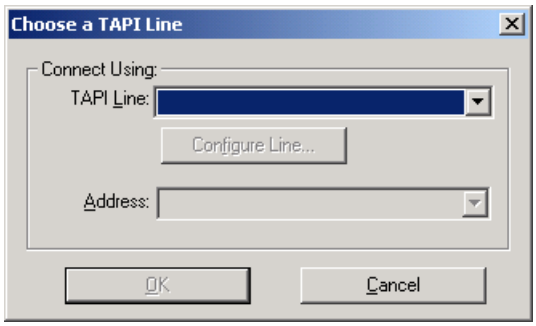


Troubleshooting

If you receive the following error message whilst trying to use Personal Call Manager:



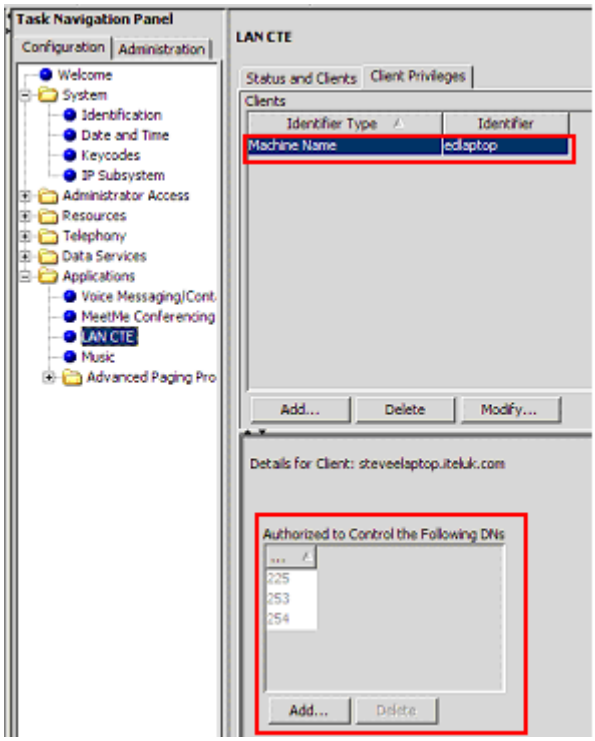
You may not be able to select a TAPI line and Address.



You should therefore:

- Ensure that LAN CTE is key coded on the BCM and installed on the PC.

- Check that the account you created in Element Manager is correct.
  - Domain\User Account or
  - IP Address or
  - Machine Name

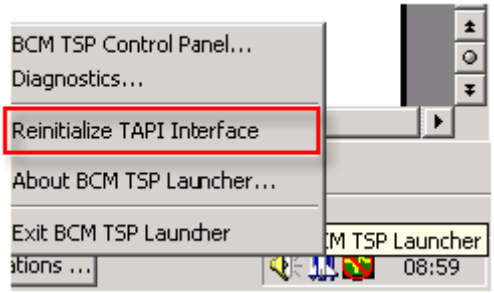


- Check that you have logged onto the computer with the correct account details.

- You will have to reboot your PC if you change any of your account details on the BCM, prior to attempting to use Personal Call Manager.

- You should then reinitialise TAPI:

  - Right click on the TSP launcher (Space Shuttle icon) on the task bar.
  - Reinitialise TAPI Interface.
  - The screen will then close.



Avaya Documentation Links

- LAN CTE Configuration Guide
- Personal Call Manager User Guide